DOCUMENT RESUME

ED 085 833 88 EA 005 713

AUTHOR	Cramer, Harold L.
TITLE	Orienting Users for New Facilities. A Report.
INSTITUTION	Chicago Board of Education, Ill. Dept. of Facilities Planning.
SPONS AGENCY	Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C.
BUREAU NO	71-7619
PUB DATE	Oct 73
GRANT	OEG-5-71-0078(290)
NOTE	28p.; Related documents are EA 005 330, EA 005 530, EA 005 638, EA 005 660, and EA 005 661
EDRS PRICE	MF-$0.65 HC-$3.29
DESCRIPTORS	*Case Studies; *Educational Facilities; *Educational Specifications; Elementary Schools; High Schools; Junior High Schools; *Planning; Planning (Facilities); Simulation; *Staff Orientation
IDENTIFIERS	Elementary Secondary Education Act Title III; ESEA Title III; *SIMU School

ABSTRACT

Educational facilities have changed to accommodate changes in the provision of educational services. Today, educational facilities utilize innovative design concepts, new materials and finished surfaces, and sophisticated furniture and equipment. The full utilization of such facilities can easily suffer from a lack of adequate knowledge about them. Hence, orienting users to new facilities is a vital step in the completion of a school and the beginning of its use. This report addresses itself to this step and provides some guidelines in conducting a program of user orientation to new facilities. Case histories of two high schools, a junior high school, and an elementary school are cited as examples.
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ED 085833

SIMU-SCHOOL: CENTER FOR URBAN EDUCATIONAL PLANNING

EA 005 713

ED 085833

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ORIENTING USERS FOR NEW FACILITIES

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Funded by:
U.S. Office of Education
ESEA Title III, Section 306
Grant OEG-5-71-0078 (290)
Project 71-7619

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October 1973

FOREWORD

Modern-day educational planners face an extremely difficult task of providing quality education to large masses of students in view of decreased revenues, soaring costs, shifting populations and changing educational programs. Such a challenge requires that a far greater emphasis be placed on planning for schools than has been the case to date and necessitates the development of improved techniques specially designed for educational planning.

Project Simu-School is intended to provide an action-oriented organizational and functional framework necessary for tackling the problems of modern-day educational planning. It was conceived by a task force of the National Committee on Architecture for Education of the American Institute of Architects, working in conjunction with the Council of Educational Facility Planners. The national project is comprised of a network of component centers located in different parts of the country.

The main objective of the Chicago component is to develop a Center for Urban Educational Planning designed to bring a variety of people--laymen as well as experts--together in a joint effort to plan for new forms of education in their communities. The Center is intended to serve several different functions including research and development, investigation of alternative strategies in actual planning problems, community involvement, and dissemination of project reports.

The past two decades have witnessed some major changes in the field of education. These changes are characterized by humanization of educational services (zero reject concept, early intervention, etc.), individualization of curriculum (variable grouping, continuous development, bilingual schooling, etc.), individualization of instruction (differentiated staffing, team teaching, individual pupil instruction, etc.), and new and different organization of schools ("schomes", middle schools, magnet schools, etc.). During the same time period, educational facilities have changed to accommodate changes in the provision of educational services. Today, educational facilities utilize innovative design concepts, new materials and finished surfaces, and sophisticated furniture and equipment. The full utilization of such facilities can easily suffer from a lack of adequate knowledge about them. Hence, orienting users to new facilities is a vital step in the completion of a school and the beginning of its use. The present report addresses itself to this step and provides some important guidelines in conducting a program of user orientation to new facilities. It is hoped that this report will be of some interest to educational facility planners and school administrators.

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ORIENTING USERS FOR NEW FACILITIES

INTRODUCTION

Plan! Execute! Communicate! These are the important steps - the necessary ingredients - in the development of any successful program for staff orientation prior to opening a new school. Records show that the best conceived planning process and the ablest execution too often fail to produce expected, hoped-for results. Why? Because of failure somewhere during the process to communicate to those who will eventually use the new facilities. Communication is most important. It must be continuous from beginning to end. It must insure that there will be no gaps and no voids in the long process from idea to reality.

Therefore, a model that establishes guidelines for orienting the staff of a new school prior to the beginning of operations is very necessary. This model should be flexible so that it may adapt to unique situations, yet sufficiently complete and specific to extend its usefulness to those with little, or limited experience.

This paper does not propose to establish such a model. It will, however, endeavor to stimulate interest and direct attention to the ever-increasing need for, and nature of staff orientation. It will also provide certain guidelines for the development of a successful program, or model, while citing several actual case histories as examples.

NEED

Some experienced planners insist that the people who will eventually occupy and operate a new school - principal, staff, service personnel, and even the students themselves - must be involved in the planning. While this is desirable, it is not entirely essential according to those who contend that ultimately all will need some degree of orientation regardless of their varying pre-planning experiences. New design concepts; new and different finished surfaces, textures and materials; new and increasingly sophisticated environmental systems; and various items of instructional and non-instructional equipment are examples where full utilization may suffer from ignorance or lack of knowledge due to inadequate orientation.

Established modes of operation are hard to alter. Teachers, custodians, cooks and others are slow to change behavior patterns even when behavior patterns are the result of past physical facilities which have been forced upon them rather than requirements in the performance of previous tasks. Fear of the new is perhaps the greatest restraint against acceptance. Therefore, a successful orientation program must be planned to carefully familiarize the new users with the unfamiliar and to carry them through the critical "shake-down" period. Open and frank discussion are essential ingredients to success. They often break through the doubts and fears that so many have when finally called upon to use new, different, and unusual facilities, and thus tend to minimize the traumatic change-over.

Other groups that should be oriented to the use and operation of new facilities include parents, members of the community, and of course, the students. While the latter have a unique built-in ability for self-orientation, and can usually adapt rather well and quickly to new surroundings, planned orientation for students is recommended for the sake of efficiency. The strongest argument for well-planned orientation of parents and members of the community in general is to obtain, and hopefully maintain their continued and whole-hearted support of the educational environment. Without their support there is little hope for educational improvement in the community. They must be kept abreast of changes in educational philosophies and instructional programs, and perhaps most important, the educational awakening their children will experience in using new advanced educational facilities.

Orientation of all groups, but particularly parents, members of the community, and students can be accomplished in several ways. The principal, his staff, the school district central staff, and even the architect and the planning team might well share the responsibility. Written statements of philosophy, together with an explanation of the instructional program and a description of the physical features of the new school should be prepared for distribution. The publication should be reinforced with opportunities to hear explanations, discuss programs and visit the school. However, since most school construction projects are rarely completed on time, it is suggested that this be anticipated by scheduling meetings in homes of parents or in public places within the neighborhood, before construction is due for completion.

An operational plan for a new school requires more detail than is usually provided in the educational specifications. Therefore, to insure a smooth opening, and efficient operation thereafter, a well documented and well communicated operational plan is needed. While the plan will require the total efforts of everyone for successful implementation, it should be developed initially by the principal and his staff.

When new facilities are designed for a non-traditional program, with instructional areas changed from the standard classroom to open space, the role of the teacher must also change in order to effectively utilize the facilities. The teacher must acquire new knowledge and new techniques for team planning, team teaching, and continuous individual progress of students. All these may succeed to some degree in traditional facilities - and in rare cases the teachers may be prepared to change to open space utilization - but in 95% of new open space schools, some staff development is needed.

Thus, staff orientation, with a minimal level of re-education of teachers should guarantee initial success when the new school begins operation. The faculty can then build on that success to develop a highly effective instructional program even though true perfection may never actually be achieved. Team teaching dates back approximately fifteen years, and most teachers today have at least some knowledge of its use. However, a faculty that is unfamiliar with operation in open space will require perhaps two to three years of staff development to reach peak efficiency.

NATURE OF PROGRAM

Communication, and in-service training or staff development are necessary activities in the preparation of a program for the operation of a new facility. Both are important. However, the need for adequate communication is two-fold and therefore more critical in terms of assuring success.

First, the program should communicate the instructional plan and design concepts to the users of the facility. Resources to accomplish this are:

1. Written documents including philosophy statements, curricular materials, and educational specifications.
2. Expertise of those involved in the planning including educators, consultants and the design team.
3. Architectural plans, and last but not least, the completed facility.

Second, the program should communicate the physical aspects of the facility including unusual materials of construction, systems and equipment to appropriate faculty, staff and service personnel. Resources available to do this are:

1. Written documents including educational specifications and manufacturers' publications.
2. Expertise of the design team; manufacturers' representatives; and suppliers of material and equipment.
3. The completed facility.

Communication is greatly enhanced and facilitated when advantage is taken of all available sources of information. These sources would include:

1. Review all written documents.
2. Presentations and demonstrations by resource personnel.
3. Discussions between resource personnel and user.
4. "Hands on" operation of facility and equipment under authorized and planned supervision.

Nothing can provide orientation as well as actual practice, and of course, the best place is in the new facility itself. Demonstration by experienced educators and factory representatives can be followed by supervised practice. The procedure is ready-made for success. Unfortunately, however, construction is rarely completed in time to allow orientation and practice in the new school, and the new staff must often improvise space in existing facilities in order to develop teaming techniques.

For example, in one case a middle school team operated for several years prior to planning a new school in what had been a World War II military building. In another, teams operated in a gymnasium of an old school. These are but two isolated instances to illustrate that practice, wherever possible, will produce results.

Other, and no less important, features of a program to develop an operational plan includes guidelines for staffing and faculty organization, curriculum selection and implementation, selection of learning

activities so that specific goals may be achieved, public reporting, and plant operation.

The operational plan is actually the implementation of the educational specifications - or user requirements - which are prepared initially to communicate educational criteria and needs to the architect. However, the operational plan goes even further than the educational specifications and requires more details and additional features to insure a smooth opening of a new school and the smooth operation for at least the first year. A partial list of such details and features would include the following:

1. Staffing Plan
2. Philosophy Statement
3. Curriculum Guidelines
   a. Statement of goals
   b. Course offerings
   c. Scope and sequence of courses
   d. Learning activities
4. Organization for Instruction
   a. Organization of students
   b. Organization of teachers
   c. Organization of courses and learning activities.
5. Accounting and Reporting to Parents
6. Schedules
   a. People
   b. Time
   c. Space

7. Plans for Opening of School

   a. Maintenance and operations schedules

   b. Building supervision schedules (during and after school hours)

The plan for staffing is extremely critical. The principal and the school district office both must understand the real importance of obtaining people who agree with the stated philosophy and are capable and willing to implement the instructional program as stated in the educational specifications. It is important, too, that students, parents, and community be given the opportunity to review the philosophy and goals to insure familiarity and understanding by all. This is total involvement. Finally, the plan should provide for early identification of personnel to be selected, or transferred into the new school.

The typical curriculum is generally stated in broad terms which lists courses and scope of sequence, but leaves the specific definition of course goals and the selection of learning experiences to each individual school. The quality of the courses are therefore dependent upon individual teachers, and to a lesser extent, upon department heads. While the task of defining course goals and selecting learning experiences is relatively simple in a traditional school organization because of limited team planning requirements, curriculum planning requires the highest level of leadership and the best talent available when the organization of teachers requires team planning. The task also becomes more difficult as the philosophy and goals continue to change.

Activities - learning activities - are needed to enable the learner to meet certain course goals. When the goals are traditional in nature, the activities are familiar and consist primarily of reading. Publishing companies constantly search for new markets in their attempts to meet the goals which are emerging from the needs of society and the desires of the public. Textbook and resource books are relatively easy to select, and are an obvious source of learning activities for the staff of a new school. However, recognition and better understanding of the unique differences in the capacities and abilities of men to learn has stimulated a new philosophical stance for individualization of learning activities. This new philosophy greatly broadens the opportunities and requirements for selection in wider areas of interest and learning activities. The faculty of a new school that is dedicated to individualization may need the services of consultants in selecting proper learning activities and developing individual learning units.

The organization for instruction within a school has been changing at a rapid rate in recent years. The traditional concept of a single teacher for each thirty students in a self-contained classroom is being replaced by a new concept of a team of teachers for 75 to 150 students in a large, open, loft-type space. In order to successfully make this change, organizationally, philosophically and physically, the educational specifications must spell out the plans in detail as they affect both teachers and students, and the physical facility must provide the necessary spaces.

The faculty must be organized into compatible teams whose members have time to plan the curriculum and consider innovative approaches to course organization. Most elementary schools in the past have been traditionally organized on a grade level basis, but more and more they are moving to organization for individualized continuous progress. Most secondary schools have been traditionally organized by departmental divisions, but a trend is now evident, particularly at the middle school level, to organize on a thematic basis. Thus, changes in organization, philosophy, learning habits, teaching techniques, and facilities design must complement one another if education is to move ever forward.

Scheduling is one of the most obvious tasks to be performed, and the system of scheduling ultimately selected or developed must be compatible with the curriculum goals and objectives. It is necessary to identify the resources of faculty and students, as well as availability of time and space. Innovative approaches have emerged in recent years which offer more control by the users in an attempt to organize time to accommodate the learning tasks. It is advisable that both faculty and students become involved in decision making related to length of time and frequency of activities in order to take advantage of the varied opportunities afforded by flexible-type schedules.

The successful operational plan should also include such non-instructional aspects as accountability for learning; a system for reporting to parents; registering, scheduling and orienting students; distributing student schedules; placing equipment and ordering supplies.

Finally, a rather comprehensive plan for operation of the physical plant should be given consideration. It should be developed before school opens, if possible, and should include a schedule for preventative maintenance, equipment service, delivery and pick-up, and a schedule for custodial services that includes daily, weekly, and periodical and infrequent tasks.

DEVELOPMENT OF PROGRAM

Responsibility for leadership in planning and developing the orientation program rests logically upon the principal even though resources may be supplied from the district, or other levels, in terms of personnel, funds, or consulting services. Success of the program will ultimately depend upon the enthusiasm, efforts and leadership supplied by the new school's principal, who, together with his supporting team will need to consider the following:

1. Needs
2. Necessary Tasks
3. Possible Activities
4. Available Resources
   a. Time
   b. People
   c. Funds
   d. Other

A primary objective of the orientation program is that it is sufficient in scope to guarantee a successful operation the very day school opens for instruction. If this objective is realized, then it is possible to build upon initial success rather than be forced to overcome initial shortcomings, or even failure.

It is not uncommon for a facility planning team, one composed of experts in various fields, to express and recommend the need for a relevant

individualized continuous progress program in a conservative school district that is traditionally oriented to group learning. Successful implementation must then result from a sequence of steps representing logical development of instructional staff skills, and would include:

1. Team Planning
2. Team Teaching
   a. Large group
   b. Small group
   c. Individualized instruction
3. Ungraded Programs
4. Differentiated Staffing
5. Year-Round Operation
6. Open Campus (secondary level only)
7. Self-Directed Study (independent work time)
8. Modular-Flexible Schedule with Large Blocks of Time.
9. Inter-Departmental Teaming.

It is essential that an orientation program is capable of implementation within the time and resources available. Therefore, in preparing to open a new facility, school district leaders should include the following steps for consideration immediately upon completion of the educational specifications:

1. Complete Architectural Planning.
2. Appoint Principal (if not appointed earlier)
3. Identify Staff Members (if not identified earlier)

4. Develop Plan

   a. Involve staff, community, architect, consultants, others

   b. Consider resources

   c. Identify activities

   d. Review philosophy

   e. Identify goals

   f. Review school district courses of study

   g. Develop curriculum plan

   h. Define instructional rationale (related to groupings of teachers and students and availability of learning materials.)

   i. Develop schedule of time, space and personnel

   j. Develop plan for pupil accounting and reporting to parents

   k. Develop plan for opening school (orientation of students, parents, others.)

   l. Develop plan for operating school (supervision of plant before, during, and after school hours; transportation schedules; dining schedules, other)

5. Plan Interior Furnishings - Demountable Partitions and other Space Dividers, Furniture and Casework (review if selected earlier)

6. Select Instructional Equipment (review if selected earlier)

7. Select Learning Materials (review if selected earlier)

8. Select Maintenance and Custodial Equipment (review if selected earlier)

9. Orient Non-Instructional Staff

   a. Orient custodial staff concerning surface materials and cleaning methods.

   b. Orient custodial staff concerning operation of cleaning and other custodial equipment.

   c. Orient maintenance staff concerning building equipment and routine maintenance needs.

   d. Develop schedule for cleaning and preventative maintenance.

   e. Orient food service staff concerning operation, cleaning and care of kitchen equipment.

CASE HISTORY - TWO HIGH SCHOOLS

The nation's 13th largest school district in terms of enrollment, with 114,000 students and more than 5,600 professional staff members, began construction on two new high schools in early 1970. These schools were designed to accommodate student enrollments of 3,000 and 2,000 respectively and both were occupied and ready for use on September 7, 1971. They became the 37th and 38th secondary schools in the district, and although quite compact in design, one covered approximately six acres of ground space and the other covered approximately four and one-half acres of ground space. However, the unique aspect of these schools concerned neither capacity nor size but rather the fact that they represented a definite break in tradition for this school district. Space was designed by the architects for each project to satisfy not only today's needs, but also tomorrow's change. Areas set aside for mathematics, social studies, language arts and other related general education programs were partially open, with various divisions of space accomplished by liberal use of demountable and relocatable partitions.

The orientation program that eventually materialized was doubly important, and indeed critical, due to the fact that not even the superintendent, school principals, or district instructional leadership who were involved in the original facilities planning remained to see the buildings completed. Although it was difficult to sustain firm commitments during much of the process, a measure of relief was finally forthcoming from the district level through appointment of key personnel on the dates indicated below:

SCHOOL "A"

September 1, 1970	-	Principal, Librarian, one Secretary
January 1, 1971	-	Guidance Director and Curriculum Coordinators
July 1, 1971	-	All Department Heads, Deans, Guidance Counselors and Administrators
July 15, 1971	-	Plant Mechanic
August 2, 1971	-	Two Directors, Cooperative Business Education Programs
August 16, 1971	-	Remaining Faculty and four Custodians

SCHOOL "B"

September 1, 1970	-	Principal and Librarian
January 1, 1971	-	Curriculum Coordinator, Dean of Girls, Guidance Director, Secretary
July 1, 1971	-	All Department Heads (12), Dean of Boys, two Counselors
July 15, 1971	-	Plant Mechanic
August 1, 1971	-	Four Custodians
August 16, 1971	-	Remaining Faculty

The principals, behind wholehearted support from their staff and faculty, began organizing early in 1971. Consultants were brought in and a three-day workshop was held in March for fifty leaders from the two schools. The real purpose of the workshop was to develop proficiency in writing learning activity packages, and forty-nine participants were able to complete at least one package each. Some completed more, and one participant completed and field-tested with her students, fifty additional packages between March and June, 1971.

Throughout much of the summer the faculty and staff from both schools worked hard to prepare themselves, and their respective schools, for successful opening in September, 1971. During this period the principal from a high school in another state which was successfully operating an innovative program was brought in as a consultant for two days to provide detailed information relative to individualization for students.

In addition, the administrative team from one of the high schools also met with the principal, assistant principal, and a department head from still another school to discuss flexible modular scheduling which had been developed without the benefit of a computer. This was an important factor since the new school had no funds budgeted for programming or computer running time during the first year's operation. A key sort card was thus developed and the 2,000 students were actually scheduled by hand. Participation in scheduling was a new experience for the new faculty. Teachers and department heads were called upon to make decisions - new decisions - related to the total amount of time to be provided each learning activity, including the number of segments and the duration of the segments.

The school district revised the course of study a short time prior to the opening of the two new high schools and the staffs were committed to implementing that curriculum. Goals and course descriptions were stated only in broad terms and it remained for each faculty to identify the goals and objectives to be met in each course. The learning activity packages that had been developed during the spring of 1971 provided one vehicle for

individualizing after goals and objectives were identified. Unfortunately, resources were unavailable for employing consultants during the three weeks prior to the opening of school. However, some consultants were brought in from the State Department of Education and time was spent by the faculty primarily in team planning and further development and production of learning packages.

CASE HISTORY - ELEMENTARY SCHOOL

A small rural school district with only seven school centers began construction in January, 1970 on a new elementary school to replace an old, outdated school which had been abandoned for instructional purposes due to obsolescence. An experienced educational facilities consultant began working with the principal and staff a full year before the actual start of construction to develop educational specifications, coordinate architectural planning, and aid in the selection of furniture and equipment. Since the staff was involved throughout the planning process and was moved with little personnel change into the new facilities, they were well aware of the building design concepts and the instructional programs that were to be offered. The planning and construction schedule was as follows:

January, 1969 - Beginning of Educational Specifications

May, 1969 - Completion of Educational Specifications

July, 1969 - Commissioning of Architect

January, 1970 - Beginning of Construction

May, 1970 - Development of Specifications for Furniture and Equipment

November, 1970 - Receipt of Bids for Furniture and Equipment

March, 1971 - Completion of Construction

The old, original school that was replaced had standard classrooms that accommodated thirty students and one teacher, whereas the new school was planned and designed for team teaching with instructional spaces that would accommodate approximately 120 students each. Therefore, in

order to provide the teachers with necessary skills for teaming and individualizing the learning process, the following activities were scheduled and took place on the dates as indicated:

August, 1970	-	Unipac Workshop for all staff members (one week)
September, 1970	-	Began using auditorium in old school that had been modified to accommodate one team of teachers
February/May, 1971	-	Began planning in-service workshops to be held in August for faculty and staff
August, 1971	-	School Board approved differentiated staffing for new school. Three weeks of in-service work provided for all teachers with appropriate time scheduled for maintenance, operations, and food service personnel.

The primary objective of the Unipac Workshop was to provide every teacher with the opportunity to develop sufficient skill to complete at least one individualized learning package. While learning packages do not provide a curriculum, they do provide one means of individualizing, and it is necessary to identify goals and curriculum scope and sequence for meeting those goals before any meaningful learning packages can be adequately developed. Thus, the teachers were able to experiment in their own classrooms in developing and field testing learning packages.

With minor changes and modifications, the auditorium in the old school was converted into a team teaching center. This afforded an excellent opportunity to begin development of practices which could be demonstrated to, and used by, everyone in the school.

Between February and May, 1971, a program was planned for utilizing time during August for in-service training. Teachers were to receive extra compensation for this time as it was in addition to the normal, pre-school duty required of all instructional personnel in the district. Thus, the pre-school period was extended to three weeks and was utilized by the teachers in the new school for organizing into teams, developing individual learning packages and developing and preparing both short range and long range evaluation materials for students and teachers. Staff members from a neighboring elementary school, with experience in a similar program, served as consultants during a portion of this pre-school period.

In addition, maintenance and operations personnel were given instructions in preventive maintenance of building equipment, use and operation of cleaning equipment, and care of surface materials which in many cases were new to them. Food service personnel familiarized themselves with new kitchen equipment, and with the aid of a food service consultant from the State Department of Education, lunch was actually prepared for the staff for two days with menus selected that would require operation of all equipment.

Plans have been made for a comprehensive evaluation of administrators, teachers, students, and service personnel and plant at the end of the first semester, with a follow-up evaluation at the end of the first full school year. While the orientation program was well planned, well financed and well executed, one caution is appropriate - commitment by school officials to finance a program for differentiated staffing should be made very early during the planning and orientation process.

CASE HISTORY - JUNIOR HIGH SCHOOL

A medium-sized school district with a total of almost 60,000 students, began construction in April, 1970 on a new junior high school to replace an old, outdated existing junior high school. The principal and a portion of his staff participated throughout the entire planning process and continued on through the construction phase in preparation for opening the new school in September, 1971. The planning and construction schedule was as follows:

October, 1969	-	Beginning of Educational Specifications
December, 1969	-	Completion of Educational Specifications
February, 1970	-	Approval of Final Architectural Plans
April, 1970	-	Beginning of Specifications for Furniture and Equipment
April, 1970	-	Beginning of Construction
May, 1971	-	Completion of Specifications for Furniture and Equipment
September, 1971	-	Completion of Construction

The old, existing school had traditional standard classrooms, whereas the new school consisted of large open team teaching spaces surrounded by conference and seminar rooms and project areas. The principal and district administration recognized that this new design concept would necessitate in-service training for the staff to effectively use the new facility, and although a consultant from a nearby university helped in

planning the activities, the major responsibility fell upon the principal and his staff.

The primary goal of the in-service training was to individualize the new instructional program, and in order to do this it was first necessary to organize time on a modular and flexible basis, then define the course of study, and finally, prepare learning activities packages. The school district thereupon made the necessary financial commitment for five additional weeks of work time for the faculty during July and August, 1971 prior to the opening of school. The schedule for the in-service activities is as follows:

July 19	-	Work begins
July 21-23	-	Consultants from the State Department of Education work with the staff.
July 30, Aug. 6 & 13	-	Consultants from university review week's work.
August 16	-	Evaluation team from another school district presented criteria for formal evaluation

The first meeting on July 19, 1971 was conducted by a university professor who made presentations on flexible scheduling and its potential for individualization. Those attending the meeting, in addition to the principal and his staff, included school board members, the superintendent, and school district administrators and supervisors. Considerable time was provided for questions, and discussions in small work groups, and the meeting in general afforded an excellent opportunity for frank communication

between all participants.

On three successive Fridays the consultants from the university reviewed the week's work with staff members, offered constructive criticism and suggestions, and presented films and video tapes to illustrate teaming and individualization. Finally, at the conclusion of the workshop, each team gave a progress report on achievements and plans for the coming school year.

In retrospect the leaders involved in the workshop noted with regret that no orientation program had been provided for non-instructional personnel. They noted too that reliance on press releases, rather than direct involvement, was an inadequate procedure for disseminating information to the public and community.